

Transaction Supervisor's Forum 11/17/16

Benefits Unit

We have been receiving escalation emails with incomplete information. In order to answer or direct your emails to the appropriate unit, please refer to the escalation email guidelines on the SCO website.

The Benefits Unit has been receiving faxed questions. Departments need to call the Customer Contact Center (CCC) and listen to the updated information. Calls will be returned within 48 hours.

Open enrollment is going well.

Question: Why hasn't anyone provided a response to my email?

Answer: We have new staff, so we apologize if there is a delay in a response. Thanks for your patience.

IRS Lock Letters

Employees have been contacting the PPSD Ops Support Unit regarding IRS lock letters. Employees should not be instructed to call SCO. The Personnel Specialist should be calling for them, or the employee needs to contact IRS directly.

Mass Updates

SCO ran mass updates in October/November for BU 5, BU 7, Excluded, and Exempt employees.

Personnel Letters regarding these mass updates are available on the SCO website.

Lump Sum Deferral

Please review SCO Payroll Letter 16-009 regarding the Lump Sum Deferral process.

The Savings Plus Lump Sum Separation Pay Deferral Election Form must be submitted by the employee to their HR office at least 5 working days prior to the employee's separation date. SCO will cancel and return all PARs that do not meet the 5 day requirement.

Things to remember for lump sum deferral:

- Take employee off of direct deposit.
- Reconcile employee leave balances.
- Verify the employee's address is correct to mail their W-2.
- If the employee is claiming exempt and lump sum payments are going to extend beyond January, an EAR must be keyed as a 'deceased employee' to permanently exempt taxes before the PAR is keyed, otherwise Federal and State taxes will revert to Single and 0 withholding allowances for those payments. (See PAM Section 6.9)
- Have the employee provide a contact number to reach them if necessary.
- Provide a contact and back up contact phone number w/ ext. on the PAR.
- When deferring into two tax years, if Item 620 and Item 625 are completed on the 1st PAR – indicate in Item 10 "time in Item 620 is exhausted". You must use up all time in Item 620 before you begin using time in Item 625.
- Do not redeposit the lump sum pay if the PAR hasn't been keyed. Contact the CCC for assistance.
- Verify all payments and deferral amounts are correct immediately after pay issues.

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CPOD

Please update the California Personnel Office Directory (CPOD) for your department to ensure SCO staff have accurate contact information.

PR250 - Irregularity Notices

PR250s are being returned to SCO without making corrections, but specialists are indicating that the document has been corrected. Please review the PR250 and verify if there are any changes that have occurred before resubmitting your document.

Question: Why doesn't the person calling from SCO leave a phone number when leaving a message?

Answer: Please contact the CCC if a phone number is not provided.

Payroll Adjustment Notice – STD.674

Please verify dock time and time worked in 6B. Time worked and dock time must equal what is possible for the pay period.

Garnishment Unit

Please refer to the PPM Section Z, H-1 thru H-2 for samples on how to complete garnishment forms.

SCO Personnel/Payroll Letter Format

Have you seen the new payroll/personnel letter format?

Answer: Not many have seen it, but for those who have they say it is easier to follow.

W-2

Please make sure employees have their correct address on file to receive their W-2 for 2016. To update this information they need to submit a new Employee Action Request Form (EAR) to their HR Office prior to 12/19/2016.

Disbursement Reports

Disbursements has resolved the issues related to form 672s, LABs and AR half sheets. If you need further assistance please contact Joann Perez at 324-0121.

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Oldest Dates as of 12/05/2016		
Unit	Workload Type	Oldest Date
Position Control		
	607	12/05/2016
CS Audits		
	PARs	11/08/2016
Disability		
	IDL/Special Complex	11/04/2016
	IDL Regular	11/28/2016
	SDI Special/Complex	11/18/2016
	SDI Regular	11/28/2016
	NDI Special/Complex	11/18/2016
	NDI Regular	11/28/2016
	TD Special/Complex	11/16/2016
	4400	12/01/2016
	4800	11/30/2016
CS Payroll		
	Employment History Messages (EH)	12/22/2015
	674s	11/03/2016
	674 A/Rs	11/03/2016
Benefits		
	Dental News	11/08/2016
	Dental Cancels	11/07/2016
	Dental Changes/Appeals	10/04/2016
	Dental Changes/Appeals – CHPDIP	10/05/2016
	Dental Changes/Appeals – Code 40s	09/26/2016
	Dental Changes/Appeals – R06	11/23/2016
	Payroll Adjustment Notices – 035s	10/05/2016
	99PRS	08/12/2016
	HBD12-P	08/12/2016
	Payroll Adjustment Notices – Leave Credits	08/09/2016
	Flex Enrollment (News/Changes)	11/08/2016
	Flex Enrollment (Cancels)	11/04/2016
	Flex Reimbursements	-
	Vision	11/23/2016
Premium Pay		
	Premium Pays	11/21/2016
W-2/Misc. Deductions		
	Discrepancy Reports	11/29/2016
	Non USPS Transactions	10/17/2016
	Wage Verification	09/01/2016
Retirement		
	EH Messages	07/19/2016